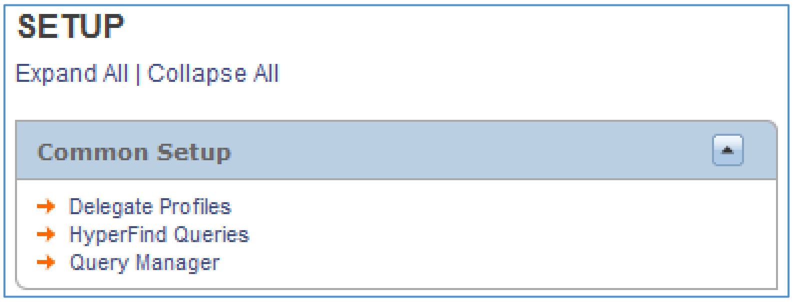
Delegate Profile Setup for Agency Administrators

eSTART
State of Alabama

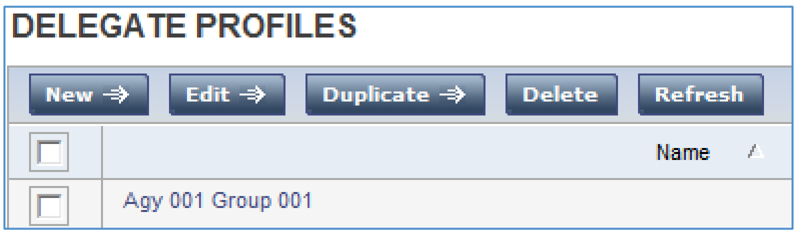
Delegate profile setup is a two-step process you must complete for each agency/division in your agency. This process adds the available managers to the Temporary Delegation pane.

Step 1 - Delegate Profile Setup

1 From the **Related** Items pane, select **Setup.** Then select **Delegate Profiles.**



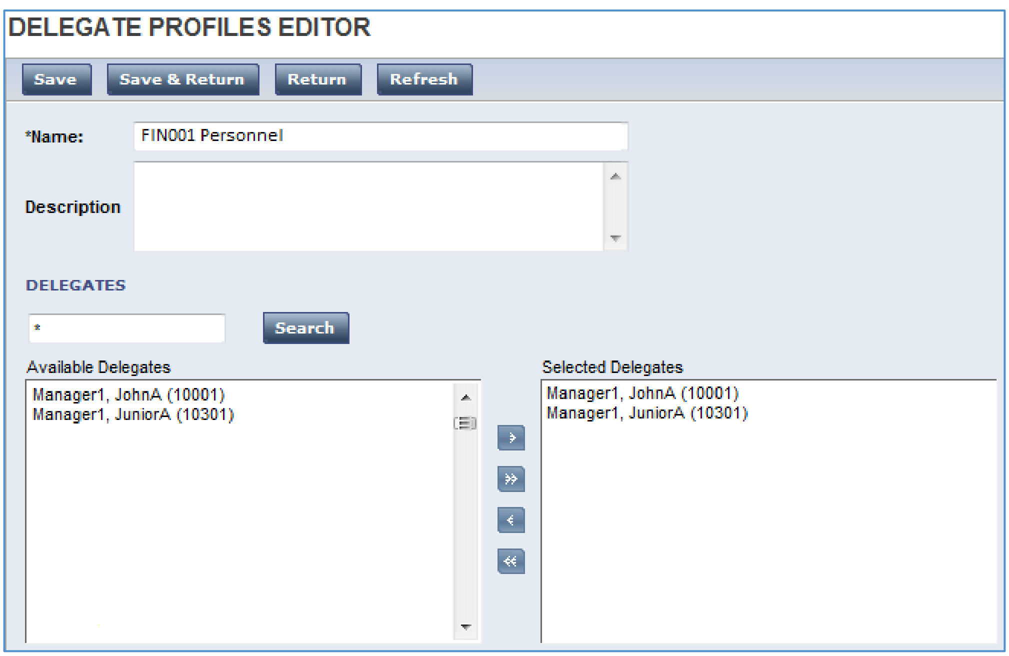
2 Select **New** from the **Delegate Profiles** screen.



3 Enter the name of the profile in the **Name** field.

Note: Use a standard naming convention for the agency to clarify each agency or division, such as **FIN001 Personnel or AG002 Accounting**.

4 Select the **Search** button to retrieve a list of manager delegates. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.



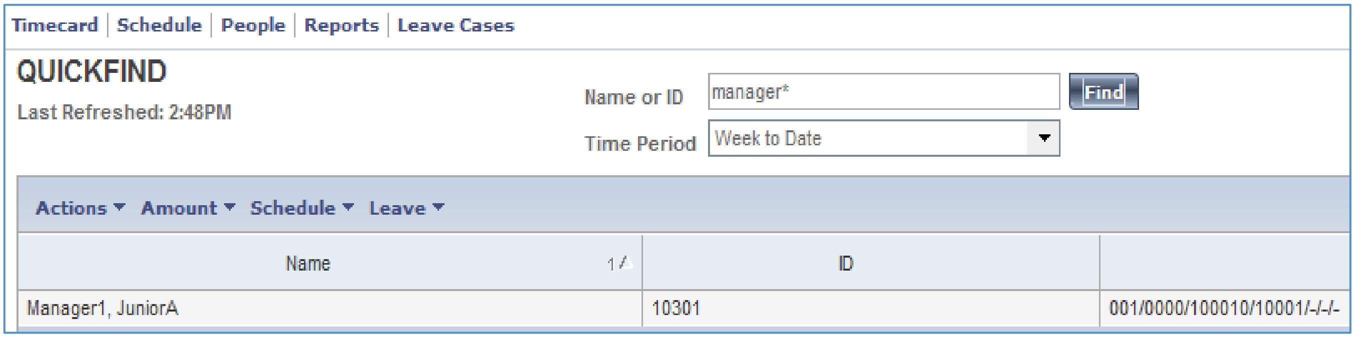
5 The **Available Delegates** display. Select the desired delegate(s), then the right arrow button to move from **Available Delegates** to **Selected Delegates**.

Note: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button.

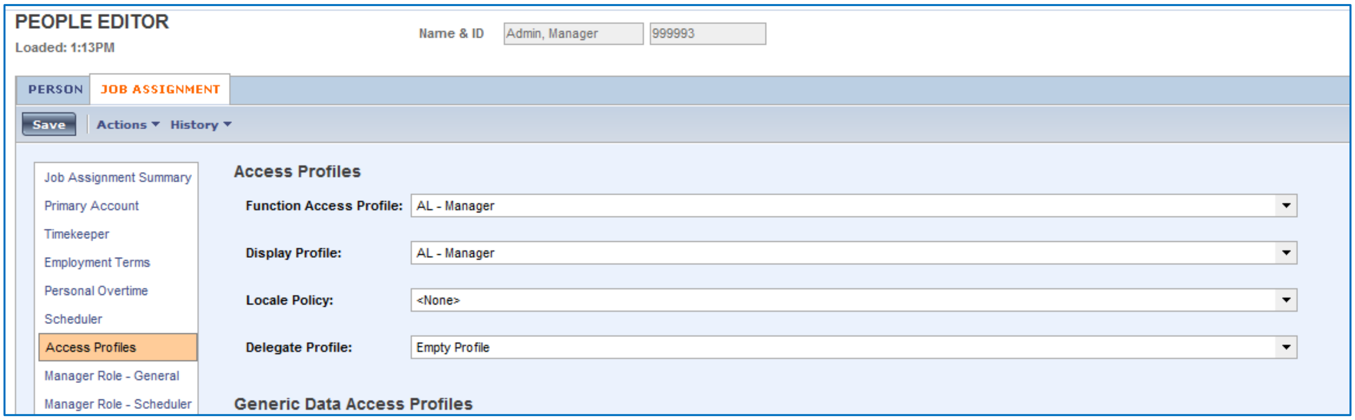
6 Click the **Save** button.

Step 2 - Assigning the Delegate Profile to the People Record

1. From the Agency Administrator workspace, select **My Genies>QuickFind.** Note that both **Reconcile Timecard** and **QuickFind** may be accessed from the **Related Items** pane located on the right-side of the screen.



2. Locate manager(s) to be added to the delegate profile.
3. Highlight the manager name(s).
4. Select **People** from the **Quick Links** menu.



5. Select **Job Assignment** tab.
6. Select **Access Profiles.**
7. Select the delegate from the **Delegate Profile** drop down.
8. Click the **Save** button.

Now the delegates are available on the Temporary Delegate pane, which must be complete at the time you wish to delegate. Refer to the **Manager Delegation for Requesting Backup Coverage** job aid for assistance.

Repeat for each manager.

If a manager needs to be removed from a delegate group, change the **Delegate Profile** in their People Record to reflect **Empty Profile**. Next, on the **Delegate Profiles Editor** screen, highlight the manager and move their name to the **Available Delegates** window using the arrow.

Note: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, Step 2 - Assigning the Delegate Profile to the People Record will need to be completed by another Agency Admin.